

Sri Lanka Information Technology Report Q3 2016

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Abstracts

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BMI View: Sri Lanka is one of the lowest income and least developed economies in Asia Pacific and this is reflected in a small IT market and industry. However, with a positive economic outlook this means there is low-hanging fruit for vendors as household incomes rise and the public and private sector modernise, that we expect to result in fast medium-term spending growth. Our forecast envisages a CAGR of 12.5% for the IT market spending over 2016-2020 to a total of LKR181.9bn in 2020. Meanwhile, we believe the local industry is positioned for further expansion, primarily in software and services, but there is also a nascent IT hardware industry.

Latest Updates And Industry Developments

IT Hardware Sales: LKR71.7bn in 2016 to LKR109.3bn in 2020, a compound annual growth rate (CAGR) of 11.1% in local currency terms. Income growth will be the key driver, which should deepen the market substantially, but price sensitivity will continue to be a key consideration for vendors.

Software Sales: LKR18.8bn in 2016 to LKR32.1bn in 2020, CAGR of 14.4%. As supporting infrastructure investments allows for increased supply, we expect software-as-a-service will deepen the enterprise software market and drive growth.

IT Services Sales: LKR23.1bn in 2016 to LKR40.5bn in 2020, CAGR of 15.1%. IT services spending will benefit from the computerisation of the public and private sectors, as well as the expansion of network infrastructure.

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